

High stakes for medium grades

By aiming to meet Europe's increasing demand for processed products and more species, US hardwood producers could improve resource utilisation from American forests while providing needed hardwood products, says Philip Araman of the US Department of Agriculture Forest Service.

US hardwood export market grade requirements are very high for hardwood export products. For logs, purchasers buy veneer logs and high grade sawlogs. Although medium grade lumber is exported, most customers demand high grade, almost clear, kiln-dried lumber. Veneer purchasers require high grade veneer with good texture.

It would be nice if we were just growing and regenerating select red and white oaks, ash, walnut, cherry, yellow birch and hard maple. It would also be nice if the trees were slowly-grown square trees without branches or defects for about 40ft. We could then produce an abundance of export grade logs, lumber, veneer and plywood. That could help us adequately supply any market with high grade material in popular species.

Coming back to the real world, we have to understand that we have limited high-grade material, and many species of wood that are not highly demanded in export markets. However, we can make high grade dimension products from our abundant medium grade resources to satisfy customer requirements. And we also have many additional species available for export.

These are some of the major reasons why you are buying our hardwoods:

- We have many of the right species.
- End users are substituting our wood for domestic species in limited supplies.
- We supply the grades of material needed, but with expanded purchases of dimension

Table 1. Volumes of hardwood sawtimber on timberlands of the United States by species, 1987

Species	All regions (billion board feet, int ¼ inch rule)	Percentage change 1977-87
Red oaks	173.1	
White oaks	118.7	
Western oaks	18.6	
(All oaks)	(310.4)	(+35)
Hickory	40.6	+22
Yellow birch	8.7	+11
Hard maple	41.3	+38
Soft maple	47.8	+66
Beech	21.2	+23
Sweetgum	39.6	+22
Tupelo and blackgum	30.9	+14
Ash	26.1	+43
Basswood	11.7	+42
Yellow poplar	52.9	+54
Cottonwood and aspen	52.2	+46
Black walnut	3.5	+60
Black cherry	11.5	+75
Red elder	26.5	+18
Other species	72.5	+11
All species	797.7	+33

Source: Waddell and others, 1989 and Bones, 1987

products, pressures on our high grade resources would be reduced.

- We are the number one producer of hardwood lumber in the world and number three or four in hardwood lumber exports.
- Our export industry is mature.
- The US has a large coordinated overseas promotion and assistance programme, making people aware of our products.

The US has substantial quantities of hardwood timber resources (Table 1); and the vast amounts of select and other species in the eastern US are an increasing resource, not decreasing, as some fear.

Thus, the US has, and should continue to have, the resources necessary to continue supplying domestic markets, to carry on as a major player in the world market for log, lumber and veneer products, and to increase exports of further processed hardwood products.

Export markets demand oaks above all other species. Oak exports account for about 60% of US hardwood lumber exports, but are only 30% of sawtimber inventory.

Ash, red alder, cherry and black walnut are also in higher relative demand than we have in

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Although now coming into vogue in Europe, maple is still an under-used species. PHOTOGRAPH COURTESY OF AHFC.

FOCUS ON NORTH AMERICA

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our forests. Under-used species are yellow poplar, hard maple, soft maple, beech, yellow birch, hickory, and others such as the gums, cottonwood and aspen.

Table 2 shows the locations of some of our hardwoods. Some 90% of all US hardwoods are located in our eastern forests. Farmers and other private owners control 75% of these resources. The total volume of sawtimber size material in the US in 1987 was 797.7 billion board feet.

Based on data collected during state resource surveys, we can estimate that eastern US hardwoods would yield about 12% top grade FAS&Sel (first-and-seconds and select) lumber, 50% in 1C/2C (No1 and No2 common) grades and 38% below 2C. This grade mix can be better if many of the smaller and lower grade logs are not harvested.

In general, top grade FAS&Sel lumber goes to buyers of clear/almost clear lumber, including export customers. Additional export opportunities lie with the medium quality lumber, graded 1C and 2C. This lumber can be converted into strip stock, rough dimension,

edge-glued panels, finger-jointed strips and panels, and short boards for export. These products can be produced in standard and specific sizes.

There are many positive reasons for purchasing dimension in specific or standard sizes. Lumber grading and handling would be eliminated, and purchasers could mould strips directly into products or edge, match and glue panels from standard length size dimension. Other advantages are reduced shipping volume, reduced waste disposal problems and reduced requirements for raw material inventory. Standard sizes would also allow producers to maintain inventories for quick delivery.

Inclosing, demands on the US hardwood forests will increase in the future. Pulpwood and, to a lesser degree, fuelwood harvests could increase substantially. These demands will be filled primarily with low grade and small diameter hardwoods.

Domestic and export demands for logs, lumber, veneer and other hardwood products will also increase. Dimension products and expanded use of lesser-known species could fill the increased demands.

Table 2. Volumes of US hardwood sawtimber on timberlands by species and state, 1987 (million board feet international ¼ inch rule).

State	Red oaks	White oaks	Hard maple	Ash	soft maple	Yellow poplar
NORTH EAST						
Connecticut	2284	530	303	310	1380	0
Maine	783	23	3406	571	2553	0
Maryland	2641	1909	128		1235	2336
Massachusetts	2082	216	417	375	1496	0
New Hampshire	1402	155	1475	500	1423	0
New York	4677	1675	8038	2387	5954	0
Pennsylvania	12646	7896	4133	2324	5628	1942
Vermont	539	58	3245	593	1065	0
West Virginia	7876	6528	1394	709	1306	3927
NORTH CENTRAL						
Illinois	4493	4338	534	784	1233	220
Indiana	3476	3405	1413	1175	810	1845
Michigan	4028	1443	7395	1582	5394	53
Minnesota	2224	1258	774	1030	328	0
Missouri	7709	6328	170	323	430	4
Ohio	4220	4647	1447	1432	962	2027
Wisconsin	6489	2241	3855	1373	2185	0
SOUTH EAST						
Florida	3406	2125	46	815	928	173
Georgia	11222	5856	22	716	1717	4821
N Carolina	10401	9597	380	1165	3883	10250
S Carolina	6741	3045	15	860	1319	2586
Virginia	11679	13203	526	732	2449	10306
SOUTH CENTRAL						
Alabama	7120	4040	44	863	330	2608
Arkansas	10164	6680	41	667	173	37
Kentucky	8526	8149	1050	818	953	2959
Louisiana	7293	2712	14	1208	336	203
Mississippi	9683	4872	20	673	279	1677
Tennessee	9196	9163	765	984	865	4718
Texas	6054	3102	7	398	51	0

Source: Waddell and others, 1989 and Bones, 1987.